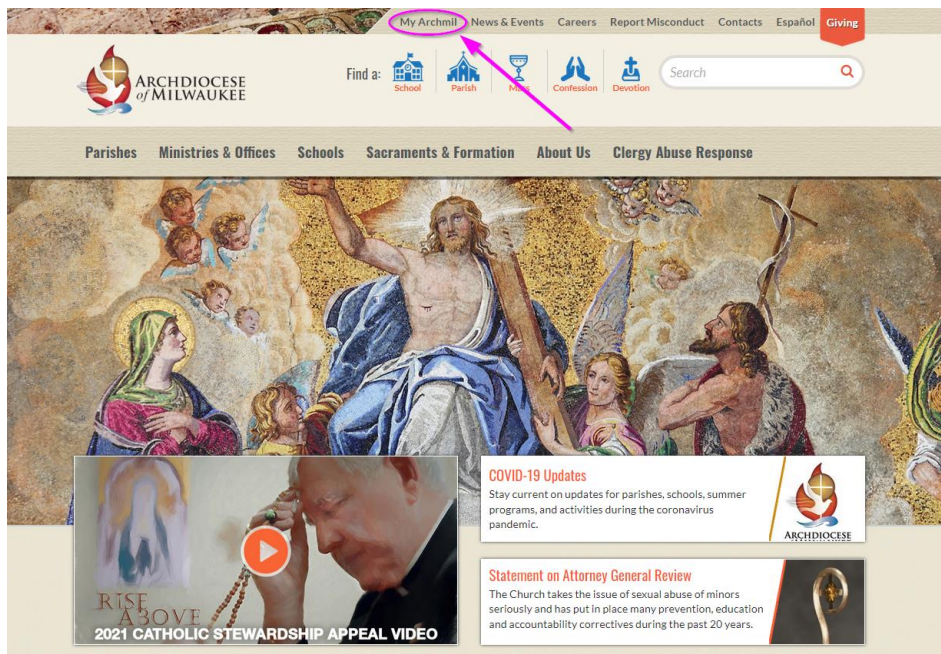


Editing Names: Parishes and Schools

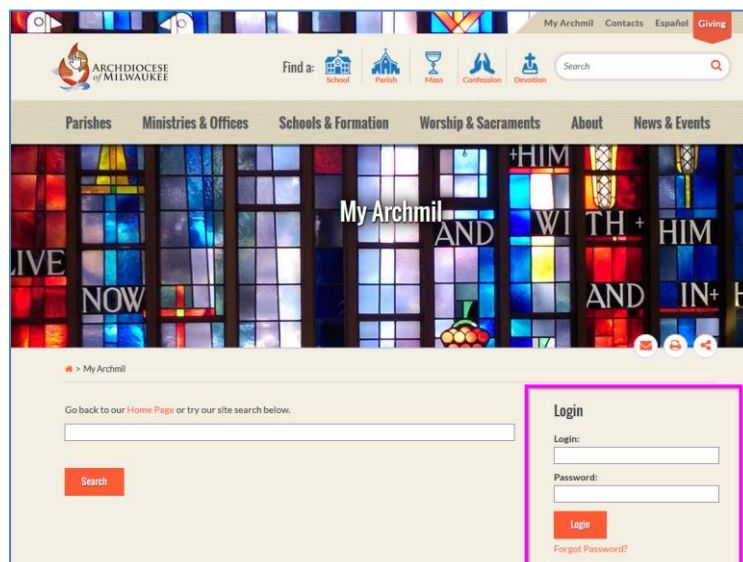
Parishes and schools have the ability to edit the contact information for their staffs and volunteers on the archmil.org website. This helps assure that individuals have the appropriate access to our system and that all important communication from the central offices is delivered to the appropriate people.

Editing Names on archmil.org

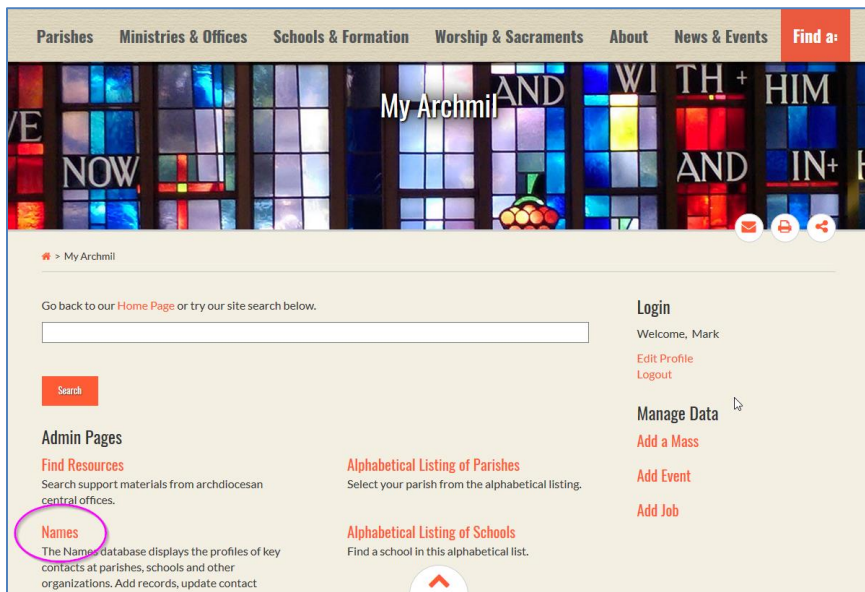
To access the **Names Maintenance** section of the site you must first log into archmil.org by clicking the **MyArchmil** link on the main blue toolbar.



Enter your **Login** (username) and password. Click the **Login** button.



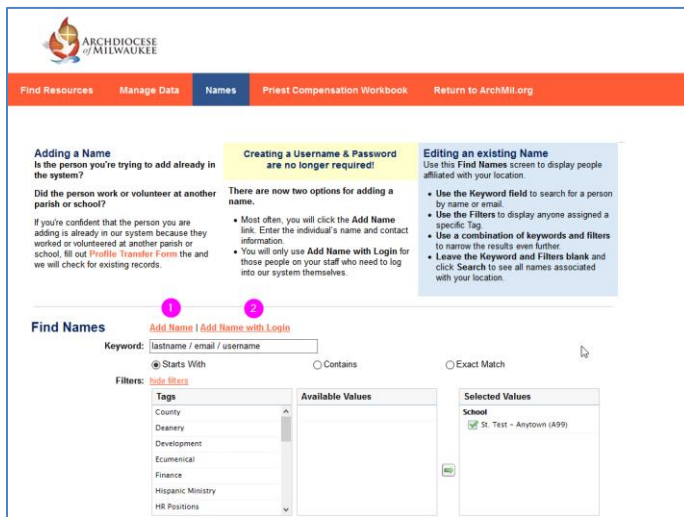
On the landing page, click the **Names** link.



Adding a Name

There are two options for adding a name.

1. Most often, you will click the **Add Name** link. Enter the individual’s name and contact information (postal and e-mail addresses);
- 2.



- 3.

Continued on next page...

1. Using Add Name

Enter the person’s name and contact information, as well as, preferences for email and postal mail.

Identification Information

Prefix:

FirstName: MI:

Last Name: Suffix:

Organization: Position:

Contact Information

Home Contact

Address 1: Address 2:

City: State/Zip:

County: Email:

Phone: Ext. Fax:

Work Contact

Address 1: Address 2:

City: State/Zip:

County: Email:

Phone: Ext. Fax:

E-mail Preferences

Please select the user’s preferred e-mail address: home, work or both.

Send to home email

Send to work email

Mail Preferences

Please select the user’s preferred postal mailing address: home or work.

Send mail to home address

Send mail to work address

Classify this User

Ensures that this person receives all appropriate mailings.

Choose all Tags and subsequent Values appropriate to this person’s location, position, ministry, etc. Then click the green arrow button (👉) to confirm the selection.

Adding a Classification (Tag)

The bottom section of the Edit Name screen provides a way to assign tags to the individual. **These tags identify a person’s parish or school, ministries, subscriptions, etc.** Individuals can have multiple tags.

To add a tag to a person's record:

1. Select a Tag in the left column
2. Select one or more options from the middle column
3. Click the green arrow button to complete the selection

Classify this User

Ensures that this person receives all appropriate mailings.

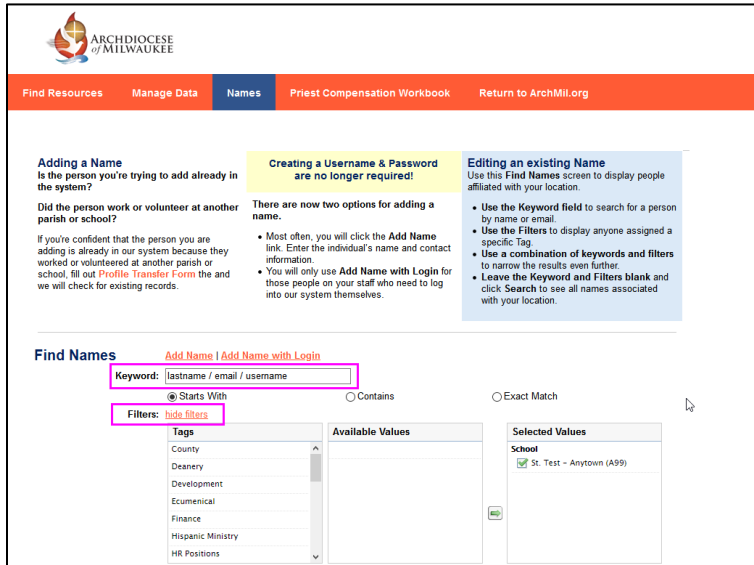
Choose all Tags and subsequent Values appropriate to this person’s location, position, ministry, etc. Then click the green arrow button (👉) to confirm the selection.

Tags	Parish Pastoral Council	Selected Values
<ul style="list-style-type: none"> Liturgy and Music Parish Parish Finance Council Parish Groups Parish Pastoral Council 1 Religious Ed School 	<ul style="list-style-type: none"> Chair Vice-Chair or Chair Elect Secretary Member at Large Christian Formation Chair 2 Human Concerns Chair Prayer and Worship/Liturgy Chair 	<p>Parish</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> St. Test - Anytown (A99) <p>School</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> St. Test - Anytown (A99)
<div style="display: flex; justify-content: center; gap: 20px;"> <div style="border: 2px solid red; padding: 2px;">Save & Continue</div> <div>Cancel</div> </div>		3

Finally, click the **Save & Continue** button to complete the process.

Continued on next page...

Editing a Name

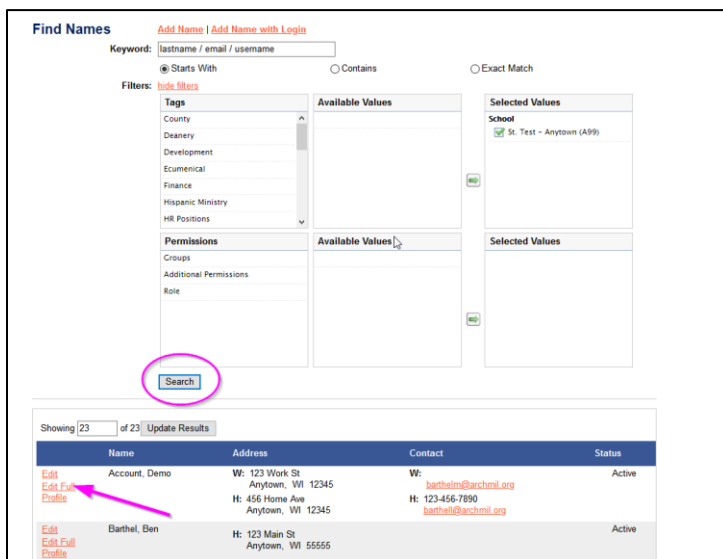


To edit a name, use the **Keyword** search and/or the **Filters** to find the person's record.

In the keyword field, you can enter the first name, last name, first and last name, e-mail, or the person's username. For example, if you enter the last name *Smith*, the system will display every person at your location with the last name of Smith. If you enter *John Smith*, the system will only display the records that match the first name John and the last name Smith.

Note that you can check Starts with, Contains, or Exact Match to narrow the results.

Click the **Search** button to run the query. Note: If you do not enter any keywords or select any tags from the filter selection, all names for your location are displayed.



The results of your search will appear below the **Search** button.

The records are displayed alphabetically by the person's last name. Home and Work contact information is shown as well as the Status of the record. Click the **Edit** link to open the profile to update an address, email or to add or remove tags. Clicking the **Edit Full Profile** link is the same as the Edit link but also allows you to add security tags for those who need to login themselves.

Using the Edit Link

Clicking **Edit** displays the individual's profile. From here, you can **update contact information** like postal and email addresses. You can enter home information, work information or both if appropriate.

You can also select where both postal and email are sent.

Edit Name

- Do not use the **Back button** at any time during the editing process
- Complete as much Contact information as possible
- Assign the appropriate **Tags and User Security** settings

Is Active

Identification Information

Prefix:

FirstName: MI:

Last Name: Suffix:

Organization: Position:

Contact Information

Home Contact

Address 1: Address 2:

City: State/Zip:

County: Email:

Phone: Ext. Fax:

Work Contact

Address 1: Address 2:

City: State/Zip:

County: Email:

Phone: Ext. Fax:

E-mail Preferences

Please select the user's preferred e-mail address: home, work or both.

Send to home email

Send to work email

Mail Preferences

Please select the user's preferred postal mailing address: home or work.


Send mail to home address

Send mail to work address

Continued on next page...

The bottom section of the Edit Name screen displays the current Tags assigned to the individual. These tags identify a person’s parish or school, ministry, etc.

Mail Preferences
 Please select the user's preferred postal mailing address: home or work.
 Send mail to home address
 Send mail to work address


Classify this User
 Ensures that this person receives all appropriate mailings.
 Choose all Tags and subsequent Values appropriate to this person's location, position, ministry, etc. Then click the green arrow button  to confirm the selection.

Tags	School Groups	Selected Values
Parish Pastoral Council	School Committee/Board Chairperson	School
Religious Ed	School Committee/Board Member	<input checked="" type="checkbox"/> St. Test - Anytown (A99)
School	School Nurse	School Groups
School Groups	School Staff	<input checked="" type="checkbox"/> School Web Administrators
Social Action	School Volunteer	
State	Secretary/Admin. Assistant	
Students	Supportive Consultants	

Using the [Edit Full Profile](#) link lets you assign security tags to an existing profile.

User Security
 Only applies to people who will login themselves!
 Please select "Author" below if this user is allowed to manage data for their assigned parishes and/or schools. (e.g. posting a job or event)

Parish Editing **School Editing**
 None None
 Author Author

Choose the roles and additional permissions for this user if they need their own access to the system. Then click the green arrow button  to confirm the selection. (Most users will have no values selected)

Permissions	Available Values	Selected Values
Groups		Groups
Additional Permissions		<input checked="" type="checkbox"/> Editor - Names
Role		Additional Permissions
		<input checked="" type="checkbox"/> List Children
		Role
		<input checked="" type="checkbox"/> Web Administrators - School

Making the person an **Author** for your parish or school gives them the ability to post jobs and events.

Assigning the security permissions (**Groups or Roles**) is required for those who will need to access secure information on our websites. In essence, it gives them the ability to login themselves to access all information available for their position or ministry.

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Editing a Classification (Tag)

To edit a tag on a person's record:

1. **Select a Tag in the left column**
2. **Select one or more options from the middle column**
3. **Click the green arrow button to complete the selection**

Finally, click the **Save & Continue** button to complete the process. (not shown)

Classify this User
Ensures that this person receives all appropriate mailings.
Choose all Tags and subsequent Values appropriate to this person's location, position, ministry, etc. Then click the green arrow button (👉) to confirm the selection.

Tags	School Groups	Selected Values
Parish Pastoral Council	School Committee/Board Member	School
Religious Ed	School Nurse	<input checked="" type="checkbox"/> St. Test - Anytown (A99)
School	School Staff	School Groups
School Groups 1	School Volunteer 2	<input checked="" type="checkbox"/> School Web Administrators
Social Action	Secretary/Admin. Assistant 3	
State	Supportive Consultants	
Students	Technology Coordinator	

Removing a Tag classification

Simply **uncheck the box** next to the selected value (it will turn into a red X) and click the **Save & Continue** button.

Classify this User
Ensures that this person receives all appropriate mailings.
Choose all Tags and subsequent Values appropriate to this person's location, position, ministry, etc. Then click the green arrow button (👉) to confirm the selection.

Tags	Available Values	Selected Values
County		School
Deanery		<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Development		School Groups
Ecumenical		<input checked="" type="checkbox"/> School Staff
Finance		<input checked="" type="checkbox"/> School Web Administrators
Hispanic Ministry		<input checked="" type="checkbox"/> Secretary/Admin. Assistant
HR Positions		

Removing tags is especially important for those records where there is a significant level of turnover (e.g. parish council members, committee members, faculty, etc.).